New) Incentive method producing greater productivity based on employee actions creating improved wages.

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FIELD OF TECHNOLOGY

The present invention consists of the methods and apparatus for effecting communications between employees, and between employees and customers. Wherein individual gain is achieved through the use of empowerment and application tools such as relationship management, work shift decisions, work shift sales, database, wherein the employee receives incentive as an improved wage for value, and company ownership. The present invention provides employees with an opportunity to improve employment opportunities, obtain and increase in personal wealth by work efficiencies and an increase in customer attendance and sales.

BACKGROUND OF THE INVENTION

Productivity can achieve greater gains by empowering employees with managerial responsibility. This is not new to manufacturing where Edward Deming's practices are used, but is a new concept for the service industries.

In a restaurant operation, for example, the raw materials are purchased, received, designed, developed or finished, presented for sale, invoiced, paid and reconciled in one place. The customer makes an electronic or physical contact, orders, accepts and pays for the food delivered at that same Unit. The employee makes an electronic or physical contact, receives a request for service or product and delivers the service or product at the Unit. Restaurant operations employ, train, order raw materials, receive and store inventory, prepare the food items for presentation, market, sell and deliver the finished product, collect information, collect payment and repeat the process with new and existing customers. The opportunity for profit improves if productivity tools and techniques are continuously created and/or refined to reduce missed opportunities.

Service industries employ part-time and full-time employees for their technical skill.

Many employees are not trained. For example, the restaurant industry provides entry-level jobs as dishwashers, hostesses and busboys. The waiter and waitress provide the majority of the communication with the customer. Customer loyalty today is determined by the combination of location, product quality, price and service. Today, the employee's role is limited. He or she has the opportunity to market and sell only at point of sale. The system inherent in this invention postulates that the employee possesses the skills to develop strong relationships with the restaurant clientele. In other industries, commission sales people generate loyalty. Commission salespeople have an opportunity to repeat sales in retail stores, and brokers dominate the financial industry. Insurance, annuity, mutual funds, stocks and bonds are products sold frequently with the same clients. In the

financial industry, phone solicitations and monthly statements increase customer contact.

Internet Protocol has expanded customer relationships to the point where sales costs have been reduced and customer retention has been increased. The restaurant industry is one of many industries having the same opportunity, when the invention is integrated into operations.

Entertainment is a growing industry and Units are providing greater diversity in themes.

Card rooms, casinos and video arcades with food and beverage services provide greater marketing opportunities and incentives for customer loyalty. There are now numerous customer incentive programs through which points are accumulated and exchanged for drink, food, products and services such as air travel. Electronic scanners and database management programs provided the information and storage needed to facilitate premium redemption.

Definition:

The status "employee" is defined as a user who has recorded a subscription agreement, Federal and State labor requirements. The Subscription Agreement is the agreement between the company and the employee which the employee is entitled the use of the ISS. The employee is assigned an Identification Profile (ID) which the ID empowers the employee to organize the work shift, set goals and objectives, and to access the customer database. Improved wages are adjusted to the level of work performed and the return for the work shift. There is an employee classification which is a part of the ID. Each

employee's performance is statistically measured and the measurement is and not limited to sales per Unit, return on equity per Unit, return on investment per Unit, cost per employee, equity accumulation and other measurements.

The term "Authentication" as used herein, encompasses multiple authentication schemes via Authentication Servers, LDAP Directory Servers, Firewall Secure Servers, Content Security, Virtual Private Network Appliances, and computers under the control of software for the purpose of authentication, protection against external and internal attacks, viruses, undesirable URL and more.

The term "Sponsor Company," as used herein, encompasses any company that wishes to offer the ISS as an employee empowerment program and customer relationship program.

The term "Unit", as used herein, encompasses any business facility, virtual facility, distribution center, broker, dealer, agent, retail store, restaurant, service center having the right to use the ISS.

The term "unit", as used with shares is a item of value, an <u>improve</u> wage which is a <u>part</u> or a full unit of shares of the business Unit.

The term "server" as used herein encompasses a computer offering a service to another computer, which could be a dedicated machine, appliance server, application computer, email server, web server, web server software, database servers and client software.

The term "auction" as used herein encompasses any sponsored company exchange of shares, and work shifts and the auction accomplished in many types of trades.

The term "under the control of software components" as used to receive, send, direct, and route and not limited to employee actions, results, update, record, and store the data from and server, appliance, database or any type of computer system.

The term "Web server," as used herein, encompasses any data processing system on which application programs and Internet sites may be stored for access and processing by Unit's computers. The Web server employs a customer relationship management application, control manager, web browser that allows for multimedia presentation of information, text, images, sound and video streaming.

An Integrated Service System (ISS) empowers employees to manage service operations.

The Internet is vital and the employee in the ISS uses it to transfer information.

The term "value" as used herein is a unit or share of equity in a corporation. The unit or share is converted within the rules of Federal and State regulations. Value as used herein is a service or product, which is well known in the art of incentive programs. Airline rewards, merchandise award, and other promotions are used by business for loyalty programs.

The term "improved wage" as used herein is earned currency to be converted into a portion of the Sponsored Companies outstanding equity or business units. The unit or share will be converted at the appointed anniversary set by the Sponsored Company.

DETAIL DESCRIPTION OF THE DRAWINGS

- FIQ. 1 is a schematic block diagram illustrating the different modules, databases controlled by the Server.
- FIQ. 2 is a schematic block diagram of the Work Shift Event Module.
- FIQ. 3 is the schematic block diagram illustrating the Work Shift Exchange Module.
- FIQ. 3A is the schematic block diagram illustrating the Schedule Market Auction Module.
- FIQ. 3B is a schematic block diagram illustrating the Scheduler.
- FIQ. 4 is a schematic block diagram illustrating **Share** Conversion Event Module.
- FIQ. 5 is a schematic block diagram illustrating the Market Exchange Module.
- FIQ. 5A is a schematic block diagram illustrating the Market Auction Module.

FIQ. 6 is a schematic block diagram of the server, modules and databases

SUMMARY OF THE INVENTION

A Unit is any business site (real or virtual) producing an item for sale or distribution. In the service industry, The Unit maybe, a department store, a specialty store, or a restaurant. A Unit may have as few as one individual with a book of clients and where the individual is employed by many different Units all separate and independent but linked to a sponsored companies (Sponsored Company) using the invention.

The invention is an empowerment system that improves an employee's satisfaction and financial future by providing employee incentives for generating customer satisfaction and repeat business. The employee is given the opportunity to accept assignment for proprietary customer contact and to convert those customers to frequent clients. The company representative is the employee assigned to the customer and using the system, he or she can provide explanation. The ISS provides the employee with the support needed to succeed in that effort through a continuously updated customer profile and the employee can use a Customer File Manager Database (CFM).

Employees are empowered in each Unit to improve skills continuously. That skill development improves employee communication and success, and consequently, employee compensation, satisfaction and morale. For example, in department stores

today, employees are not currently trained in the use of electronic mail, database file maintenance or other software tools. The present invention provides the system and infrastructure to assist in that skill development. With the acceleration of distance learning, Company learning programs can improve employee productivity. The current art allows measurement of employee productivity. Employee empowerment provides cost savings where such tools and training are provided for employee advancement within the Unit.

Customer satisfaction increases when the Unit employees use the data in the ISS to acknowledge customer preferences when they communicate telephonically, electronically and at the point of sale. Department store sales will be increased when employees can easily mine preference data stored reflecting previous purchases.

The Internet and other distributed networks provide efficient communication to the customer from the employee and employee to employee, collaborating, using peer to peer technology. The ISS provides the structure to send messages, the files to personalize the message from a database and the record of the message and its response.

The ISS uses Customer Relationship Management tools to email customer alerts regarding promotions, special events and company news. E-mail is a valuable tool that, when used effectively, can help the employee build customer loyalty and increase frequency. In a specific industry as retail, department stores use personal shoppers,

commission sale people who write or call customers when new merchandise is available or when existing merchandise is placed on sale.

Employee empowerment through application of the ISS creates considerable cost savings. The Unit's management role typical in service industries today is limited or eliminated through application of the ISS. For example, in a restaurant, the skilled employee with the highest employee classification provides any daily management decision making for the Unit. Those with the highest employee classifications will have achieved high levels of skills important to the Unit. In a restaurant for example, the employee in charge will have achieved through operating experience, an understanding of accounting, waitperson coverage limitations, cooking and other food preparation, restaurant purchasing, equipment supply and maintenance. The ISS empowers employees to make both front and back of the house management decisions in this specific operation. The employee in charge has achieved the levels of important skills at the Unit. These employees replace full time managers.

The invention provides the employee the management of work schedules wherein the employee uses the work shift module, Scheduler and the Schedule Market Auction. A Scheduler identifies employee work shifts and empowers employees to trade or auction work shifts with other work shift users. The invention encourages empowerment and effects the change furthering the decrease of management supervision.

(New) Employee scheduling decisions reduce cost which decisions are based upon projections. Seasonal and cyclical demand creates stress in the retail industry, transportation, and housing. The System adjusts the demand for work shifts to reflect seasonal and holiday occupancy and retail sales peaks, high delivery demand periods, and weak or strong weekend traffic or occupancy.

Outsourcing labor is a growing business and the demand for qualified workers is accelerating. The healthcare service industry provides home health services through which skilled nurses provide the home treatments. Eighty percent of healthcare can be accomplished by a registered nurse.

For example, in the restaurant and hospitality industry today, shift changes are most often the responsibility of the manager. Utilizes the ISS, an employee agrees to work for a Unit, he or she accepts the obligation to fulfill the work shifts assigned and to use the Scheduler and the Schedule Market Auction to exchange shifts for shifts. The system provides additional incentive to negotiate since certain shifts may be more attractive from the perspective of creating return in equity. To again use the restaurant industry as an example, exchanging a holiday shift will likely require the employee wishing to have the time off to offer a premium to the employee who agrees to work the shift. Work shifts are viewed as opportunities to acquire equity and improve the employee customer accounts, revenue classification rating. Or aggressive employees whose families are away may choose to work holiday and he or she may want to post an auction.

Auction are used because these items are hard to price. An auction opens the transaction dynamically and, after some period of time has elapsed, the item is sold to the highest bidder. The Scheduler Auction is an application through which the employee has the opportunity to acquire not merchandise, but instead additional work shifts as determined by the terms agreed to through an auction process.

Use of Auction on NASDAQ is negotiated. Market Makers who are regulated create the buy and sell side. Markets become more efficient as volume is increased and the spread between the bid and offer narrows. Shares which are earned by employees have a value.

Shares are negotiated in an auction between employees.

The ISS helps to empower employees by offering the incentives designed to help the employee gain greater levels of producing customer satisfaction, loyalty and retention, managerial skills, business negotiation ability, database management, e-mail and an understanding of business valuation.

The Employee Subscription Contract is the agreement between the company and the employee that provides the employee the ISS. The employee Identification Profile empowers the employee to exchange equity and work shifts, and to access the customer database. There is an employee classification, which is a part of the ID. The employee is encouraged to continuously improve using the ISS. The performance of each employee is updated and monitored in the ISS. Each employee's performance is statistically

measured by sales per Unit, return on equity per Unit, return on investment, work shift days, point accumulation, equity accumulation.

DESCRIPTION OF THE PREFERRED EMBODIMENT

In this section, the present invention is described in detail with regard to the drawing described in Detail Description of the Drawings. Terms used throughout the remainder of this section are used with the meanings under Definitions.

The following paragraphs illustrate the structural and operational aspects of the preferred embodiment of the present invention.

In the embodiment the present invention provides the user access in the engagement of value creation. User's value is created by employee actions based upon the terms and conditions of a subscription agreement. The actions_are essential and nonessential products, services and employment. The system provides the structure and operational aspects of the present invention for the user incentive and incentive enhancement for life long accumulation of essential, nonessential products, services and employment.

In FIQ 1, the system using a <u>Personal Computer 100</u>, which is the preferred embodiment of the invention, the system is an IBM PC compatible operating the Microsoft Windows

2000 operating system, and the Server System 150 configured as a Web Server providing access. The <u>Personal Computer 100</u> software using Netscape Communicator or Microsoft Internet Explorer, the PC is capable of accessing the system, which is composed of web pages, which is well known in the art.

FIQ 1 shows a diagram of the system for employee actions in accordance with the preferred embodiment of the present invention. The system is not limited and an APPLE Macintosh system or a more advance computer system such as an Alpha based computer system available from COMPAQ Computer Corporation or SPARC station computer system available from SUN Microsystems, Corp. may be used. "Unit" terminals using scanning techniques which systems and methods are well known in the art provide a business with a local computer.

Preferable the communication channel 110 is TCP/IP based network such as the Internet or an intranet, although almost any well known LAN, WAN, VPN technology can be used. Employees can exchange messages with enclosures such as files, graphics, video and audio. The system also supports multiple languages. Alternatively, network interface may be configured as voice and voice over IP.

The System Server 150 is typically a Web server hardware and it can range from a high end PC to racks of multiprocessor, high-end computer system optimized for the task.

Web server software can be Apache Web Server, Microsoft Internet Information Server, iPlanet Enterprise Server, IBM/Lotus Domino.

The BEA WebLogic Server and WebLogic Enterpise is the preferred embodiment. The WebLogic Server is a Java-based and EJB-compliant application server. WebLogic Enterprise is based on Tuxedo and CORBA. It is available for Compaq Tru64, UNIX, HP-UX, IBM AIX, IBM OS/400, Linux, SGI Irix, SiemensReliant UNIX, Sun Solaris and Windows NT. The supported databases are Informix, Microsoft SQL Server, Oracle and Sybase, where optimized JDBC drivers are provided and distributed transaction are based on the Java Transaction API standard. While the above embodiment describes a single computer acting under the control of software, those skilled in the art will realize that the functionality can be distributed over a plurality of computers. The diagram in FIQ 6 identifies the Server applications supporting the action on a single system. The system can be distributed over a plurality of computers in a distributed architecture wherein the databases and processors are housed in separate locations. Each location is attached to a WAN which serves as a primary communication link with other locations, servers. Those skilled in the art understand, there is an unlimited number of locations, servers, that can be connected and supported.

FIQ. 1 the system provides the employee (user), the access using a Personal Computer 100 by a user Identification Profile 500 when the employee (user) has been authenticated by the Server 150. Authentication is the verification of a user's claimed identity which is the user logs into the system which is well known in the art. A password is the preferred embodiment where the user can access the system. The user has a Public Key Identification where the PKI is stored a server database. The user PKI includes the

subscription agreement which includes the users name, address, phone number, email address, inception date and user classification. There are authentication structures as Pretty Good Privacy, X.500, x.509 and someone well know in the art can appreciate other methods and system

The server under the control of software components creates employee actions for an improved wage. The employee actions are user requirements based upon a user subscription agreement which the agreement requirements define user incentives. A Share Conversion Event 540, Share Exchange Event 560, and Work Shift Event 580, Work Shift Exchange Event 600 are recorded and stored in the file databases in the Server. The user Identification Profile is updated by each employee action.

The Identification Profile (ID) is created by the initial employee action and by executing the employee_subscription agreement. The ID is updated by the system at each employee action. J. Galt is a user wherein J. Galt has completed a subscription agreement on January 15, 2001 and J. Galt has entered into an employment agreement with an employee action of 100. J. Galt employment position is coded as ABC (ID: 01-Owi/ABC/JG. On April 15, J Galt has earned \$100 of improved wages through work shifts productivity gains (ID: 01-100iw/ABC/JG). On September 30, J. Galt added \$100 of improved wages through employee actions. J. Galt realizes \$200 of improved wages into units which is converted to shares by a formula which said formula could be a ratio of 1/100 where the price is \$100/share price and the profile is updated to (ID:01-2s/ABC/JG). On October 15, J. Galt job code has changed and the new classification

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BCD and from September 30 to October 15, J. Galt earned an improved wage of \$100 and the update (ID: 01-2s/100iw/BCD/JG). The ID provides a record for the employee and the employee's improved wages and shares within the ID.

FIQ. 2 is a schematic block diagram of the Work Shift Event wherein the diagram describes the method of recording the employee work shift event. The employee is awarded an improved wage for completing a work shift 580. The "Unit" assigns a value to each work shift which the employee has earned an improved wage. The improved wage depends upon the employee productivity actions and the "Unit" (New) employees acting as a group producing a group productivity. The work shift date and improved wage are employee actions and the event is recorded in the file database with the amount. The ID is updated user 500 is update and the user file 200, 225 is stored in the database 250.

The system provides employee account values known in the Tabulator Database 250 wherein all employee actions are improved wages, and share transactions are stored. The Ratio is stored in the Tabulator. The Ratio provides the exchange value of units and to shares.

FIQ. 3 is a schematic block diagram of the Work Shift Exchange Event 600 wherein a user employs a Scheduler 275 for work shift scheduling data, and a Schedule Market Module 400 for exchanging work shifts. The Scheduler provides the Schedule Market Module with the inquiry of a work shift exchange date. The Schedule Market Module

based upon the ID 500 executes the exchange between bidder and the seller. The user ID is updated and stored in the database.

FIQ. 3A is a schematic block diagram of the Scheduler Auction 400 wherein the Schedule Market Module which is well known in the art. The user schedule data is provided by the Scheduler (FIQ. 3B) wherein the user enters the terms and conditions of the work shift offer. Therefore the seller receives bids from users which the system has qualified and notified based upon the ID. The Market Result 400 is sent to the Work Shift Exchange Module 600. The preferred platform is Oracle 8I Marketplace Platform. The example in FIQ. 3 is an auction which is well known in the art consisting of a seller accepting buy bids from multiply buyers. The winning bid is usually the bid with the highest value. The process of the exchange is well known wherein the buyer or seller request is processed, selected by either buyer or seller and accepted. Auctions are now common in the art which the system user is a buyer wishes to buy a work shifts and the buyer issues a request for quote (RFQ) to a large number of employees who are sellers.

FIQ 3B is a schematic block diagram of the Scheduler 275. The preferred embodiment application is Simplex eFORCE that automatically generates and sorts employee work schedules by classification enterprise-wide. A user from a <u>personal</u> computer 100 request for work shift search 276 defining the date and location of the work shift. The Scheduler identifies employee 277 by the ID and employee availability. Other schedulers as Kronos Smart Scheduler which workforce management is well known in the art can generate and sort work shift candidates. The user offering a request for a specific work

shift change and the Scheduler identifying qualified work shift users based on the ID and the employee schedule. The Scheduler provides a list of qualified employee 278 and sends the list to the email directory or email server for employee notification, wherein the email has the work shift auction date, terms and conditions. The Scheduler sends the request of the Work Shift Offer to the Work Shift Exchange Event Module (FIQ. 3).

FIQ 4 is a schematic block diagram of the Share Conversion Event Module wherein the improved wage is converted to units or shares and units or shares are issued to the employee by the sponsored company. The employee converts available improved wage by the Conversion Event Module 540 using the Tabulator's 250 Ratio. The Tabulator has the ratio of improved wages or to share price and in this example it is 100 dollars for 1 share, the Conversion Event is recorded in the databases and the user ID is updated.

FIQ 5 is a systematic block diagram of the Exchange Event Module 560 wherein a user can exchange shares using the Market Module 300 (New) where buyers and sellers negotiate their bids and offers. The employee having an ID can exchange shares with other employees having an ID 500. The exchange is (New) verified (250) and recorded in the file and stored in the databases 200, 225. The Ratio is stored in the Tabulator and the shares are updated in the Tabulator 250. The ID is updated.

<u>FIQ 5A</u> is a systematic block diagram of <u>Market Auction 300</u>. The user can exchange <u>shares</u> by entering data on the <u>Market Auction Module 300</u>. The user may want to buy or sell shares. There is a buyer and a seller using the ID. The Auction Results are sent to the Market Exchange Event Module.

The preferred embodiment is Oracle 8I Exchange Marketplace Platform, wherein the user is a qualified employee buying or selling units and shares. The auction platform is an e commerce tool that is well known in the art. The auction use in the preferred embodiment is a seller auction where shares are offered.

FIQ 6 is a systematic block diagram of the Integrated Service System. The Personal Computer 100 wherein is remote or in the "Unit". The Personal Computer can be wireless, wireline and it is connected to the Server and the user gains access by the Identification Profile. The server wherein is a computer process unit, web server or central processing unit wherein the computer is in the control of software components directing modules, and databases. Email File 175 are storage files of all users using electronic mail and the preferred embodiment is Critical Path's InScribe. The directory has a list of employees which the directory is controlled by ID. This enables the "InScribe Email Message and Message Boards communication of employee actions."

There are three databases and the preferred database embodiment is Oracle 9i. The Employee File Manager 200 wherein all employee records are stored, Customer File Manager 225 wherein all customer records are stored, and the Tabulator 250 wherein the, equity ratio, sponsored company share price and improved wages are accumulated, and shares outstanding are stored. The Server's modules under the control of software components performs employee actions. The employee actions are recorded and stored

in either the Employee File Manager 200, Customer File Manager 225 and improved wage transactions updated in the Tabulator. Market Module 300 provides the method of a share exchange between employees and (New) between the Sponsored Company.

Therefore, the methods uses employee actions to generate the user's incentives by a remote or onsite computer. The employee's identification profile provides access to the server computer where the user ID is updated by the employee action. The employee can earn value by completed work shift by using the methods. Furthermore, the user earns equity and the user ID is updated by any share change. The improved wage having value is converted into the sponsored company units or shares and the units have a certain unit price or stock price and the ID is updated. The Scheduler is used when an employee wishes to change a work shift. The Scheduler provides the system with work shift and the method of selecting qualified users, which the system notifies, users by employee email. The employee bids on the work shift and there may be an exchange of a work shift and an exchange of shares which the exchange is negotiated between two employees in the Schedule Market ModuleThe employee actions (New) and improved wages are stored in the system's database known as the Employee File Manager and the Tabulator (New) adds the improved wage and records unit and share exchanges.

What is claimed is:

15. A method compensating employees using employee actions based upon a productivity gain where the gain has value and it is an improved wage using a plurality of computers connected to a distributed network comprising the steps of:

registering a qualified employee with an equity account;

setting the work shift requirement;

identifying a work shift demand in excess of the requirement for part or for all of the work shift;

identifying the employee action in excess of the requirement;

creating a value in excess of the work shift demand;

calculating the value action from the requirement;

verifying the employee action;

calculating the improved wage;

recording the improved wage;

calculating the business equity unit based upon a formula;

converting the improved wage into a business equity unit;

notifying the employee of the business equity unit;

recording the business equity unit into an employee file.

16. The method of claim 15, in providing equity from an improved wage further depends on the fulfillment of a work shift demand and creating the value comprises the steps of:

identifying the work shift requirements;

identifying a demand for the work shift;

assigning an employee with the appropriate skill classification for the demand;

17. The method of Claim 16, an employee opportunity for an improved wage comprising the steps of:

identifying the skill classification for the requirement; verifying an employee for a skill; notifying the employee of the work shift demand assigning the work shift to the employee.

18. A method of a customer assignment using a plurality of computers connected to a distributed network comprising the steps of:

recording a customer with an identifier;

identifying the customer from a database;

assigning a customer without bias to an employee during a work shift;

receiving an assigned customer, said employee falls to the bottom of the assignment list;

assigning customers based on the employee independent action of acquiring a customer.

19. The method of Claim 18 records customer acquisition to an employee comprising:

assigning an employee at a point-of-sale and customer terminal;

assigning an employee at a customer website portal;

assigning an employee from the business customer forms and applications.

20. The method of Claim 19 further records using a plurality of computers, connected to a distributed network comprising the steps comprises the following steps of:

assigning a customer only to an employee;

recording addition, change and deletion of customer preferences, request, anniversary and event dates by the customer and by the employee;

recording bookings of event of said request, anniversary and event dates by the customer and by the employee;

recording the customer actions of said request, anniversary and event dates as purchases and sales.

21. The method of Claim 20, a registered customer using a device connected to a distributed network, with a customer identifier can direct preferences comprising the steps of:

selecting his or her preference;

22. The method of claim 19, providing equity from an improved wage based on productivity gains from an employee action, it further uses an email server by an employee comprising the steps of:

receiving notification of an customer request, anniversary and event date;

contacting assigned customers with a personal notification of their preferences, request, anniversary and event dates;

responding to the customer inquiry;

recording any customer action in the customer file.

- 23. The method of Claim 15, further categorizes an employee as a team of employees.
- 24. The method of Claim 15, further registers the employee with an update comprises the step of:

calculating the current work shift business equity units;

adding the business equity unit to the total business equity units;

adding new parts or all of a skill classification;

updating the employee skill classification.

25. The method of Claim 15, further records the equity business unit comprises the steps of:

transferring the equity business unit to other employees;

gifting the equity business unit to other employees;

selling the business equity unit to other employees;

purchasing the business equity unit from other employees;

selling the business equity unit to the sponsored company who issues the equity business unit.

26. A method records the transfer of assigned customers with step of:
providing a notification of a part or all of the employee' book of customers;
providing access to the employee book of customer files;
providing the means of accepting bids and offers;
transferring customer assignments to other employees;
recording the transfer between employees.